

Lawrence Livermore National Laboratory (LLNL)

Business Management Training

Overview

Lawrence Livermore National Laboratory, Livermore, California, offers a variety of business management related training.

Contained in this section are points of contact (POC) and course descriptions for the following business management related areas:

- Financial Management Training Program (FMTP)
- Administrative Information Systems (AIS) Department
- Technology Transfer Initiatives Program
- Procurement Department
- Business Services Department

A more extensive listing of all LLNL courses is available from the LLNL Human Resources Department.

LLNL POC

For general information about business management classes at LLNL, contact:

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For information on any of the individual classes listed in the rest of the LLNL section, contact the POC for the organization that is offering the course or the POC listed with the course description.

Financial Management Training Program (FMTP)

FMTP Overview

The LLNL Financial Management Training Program (FMTP) was established in 1993 to enhance the training curriculum for people with financial management responsibilities and to meet the needs of a changing business environment. A training needs analysis was conducted and an Advisory Committee was established to help focus the training program on customer needs. The Advisory Committee has representatives for each of the LLNL Associate Directors. The FMTP develops in-house training or seeks outside sources to fulfill the customers' needs.

A customer survey identified the need for twenty courses. The FMTP Leader and the Advisory Committee prioritized the twenty courses on the basis of the highest customer need for the subject matter and split the course development process into three phases that would span approximately three years. Phase I focused on revisions and restructuring of some existing courses and the development of new courses. Phase I produced six FMTP classes. During FY94 and FY95, the FMTP has continued to develop new courses while updating and teaching existing courses. Phase II of our course development schedule is 55% complete as of the end of FY95. Phase III is scheduled to begin by April 1996.

In addition to classroom training, the FMTP developed a training module and provided a briefing for Laboratory Managers and Project Leaders to explain the new LLNL Business Management System for FY95. Eleven briefings were delivered to the Programs, on request, and were conducted at staff meetings and all-hands meetings.

Financial Management Training Program (FMTP), Continued

Point of Contact

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FMTP Mission

The mission of the Financial Management Training Program (FMTP) is to provide training which will enable LLNL personnel to fulfill their financial management responsibilities in:

- Meeting the needs identified by the LLNL program/organizations
 - Support of the LLNL Mission:
“Achieve excellence in business management and administration”
 - Compliance with:
Contract 48, including DOE Orders and Performance Measures
Cost Accounting Standards (CAS)
LLNL Policies and Procedures
-

FMTP Advisory Committee

An Advisory Committee was established in 1993 and is responsible for developing the LLNL Financial Management Training Program as follows:

- Define course content, prerequisites, and target audience
- Establish course development priorities
- Establish focus groups for course development
- Evaluate courses and instructors in pilot presentations

The Advisory Committee includes a representative from the Finance Department, Budget Office, and each Associate Director.

Financial Management Training Program (FMTP), Continued

FMTP Course Development Phase I

Courses	Status
Overview of Financial Management	Complete
Federal Budget Process & DOE Funding	Complete
Cost Estimating Workshop	Complete
Quality Budget Estimating for the Non-Financial Manager (renamed: Financial/Workforce Planning for Managers)	Complete
Effort Workshop	Complete
Ledger Adjustments	Complete

FMTP Course Development Phase II

Courses	Status
Construction Funding & Accounting Module I & II	Complete
Construction Funding & Accounting Module III & IV	Complete
Construction Funding & Accounting Module V, VI, & VII	Complete
Capital Equipment	Complete
Unallowable Cost	Complete
Program Development for the 90's	Complete
Work for Others	In Process
What's New for FYxx	In Process
Distributed Budgets	To begin 10/95
How to Interpret Financial Information	To begin 10/95
Procurement Process for the User	To begin 10/95

FMTP Course Development Phase III

Courses	Status
Financial Audits and Reviews	Future
Overview of the Controller's Organization	Future
Laboratory Directed Research & Development (LDRD)	Future
DOE Financial Reporting System (FIS)	Future
Cost Accounting Standards (CAS)	Future
Introduction to Financial Accounting and Cost Accounting	Future

Financial Management Training Program (FMTP), Continued

Courses Available

Course Title:	Overview of Financial Management
Course Number:	FM1000
Fee:	No fee
Developed, Revised:	12-93, revised 6-95
Operations Office:	DOE/OAK
Contact:	Pamela Kappelhof 510-422-6171
Audience:	Open to all employees
Description:	This course will provide an introduction to the major issues and factors involved in financial management. Participants will learn to work within the internal and external influences that affect financial management at LLNL. At the conclusion of the class, participants will be able to identify methods for funding programs as well as support organizations, the financial management responsibilities of every employee, and where to go and who to see for more detailed information. This course also allows participants to obtain the basic knowledge, skills, and attitudes necessary for other courses within the Financial Management Training Program (FMTP).
Prerequisites:	None
Media:	Computer-based slides
Activities:	Crossword puzzle review
Course Length:	3.5 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student	
Evaluation/JPM:	None
Applicable DOE	
Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Course Title:	The Federal Budget Process and DOE Funding
Course Number:	FM1010
Fee:	No fee
Developed, Revised:	12-93, revised 4-95
Operations Office:	DOE-OAK
Contact:	Pamela Kappelhof 510-422-6171
Audience:	Resource analysts and project leaders who manage funding from the DOE and other Federal agencies.
Description:	<p>This course provides participants with a comprehensive review of the Federal Budget Process (FBP), DOE funding process, and LLNL-related activities. At the conclusion of this course, participants will be able to:</p> <ul style="list-style-type: none"> • Describe the FBP • Describe the DOE funding process as it relates to LLNL • Apply knowledge of the FBP to effective decision-making and budget management • Identify types of DOE funding • Distinguish between Budget Authority (BA) and Budget Outlay (BO), and identify uncosted obligations • Demonstrate how to prepare a Field Work Proposal (FWP) • Interpret the Work Authorization Form (WAF), Approved Funding Program (AFP), Contract Mod, and Cost Budget Report
Prerequisites:	FM1000, Overview of Financial Management (recommended)
Media:	Computer-based slides
Activities:	Section summary review questions
Course Length:	3.0 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student Evaluation/JPM:	None
Applicable DOE Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Course Title:	Cost Estimating Workshop
Course Number:	FM1020
Fee:	No fee
Developed, Revised:	12-93, revised
Operations Office:	DOE-OAK
Contact:	Pamela Kappelhof 510-422-6171
Audience:	Resource analysts involved in detailed development of cost estimates for projects or organizations.
Description:	<p>This course provides participants with a comprehensive understanding of the techniques for establishing and managing quality budgets. At the conclusion of this course, participants will be able to:</p> <ul style="list-style-type: none"> • Define a FTE and other labor categories, and calculate their costs • Assist the project leader in identifying expenses and the required level of effort, and calculate their cost • Determine when and how to apply distributed charges • Develop quality budget plans and adequate documentation • Evaluate options for ensuring adequate funding for unplanned expenses or unknown levels of effort • Determine the most useful cost tracking and management techniques for your area • Determine the most appropriate cost-estimating techniques for your project <p>Participants will be asked to share experience and work with others in small groups on class exercises.</p>
Prerequisites:	FM1000, Overview of Financial Management (recommended); FM1025, Financial/Workforce Planning for Managers is <u>required</u> for all Resource Analysts with less than 1 year of experience.
Media:	Computer-based slides
Activities:	Classroom scenarios to develop cost estimates
Course Length:	9.0 hours (over 3 days suggested)
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student Evaluation/JPM:	Written post test (also used as pretest and followup)
Applicable DOE Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Financial/Workforce Planning for Managers
Course Number:	FM1025
Fee:	No fee
Developed, Revised:	12-93; revised and renamed, 7-95
Operations Office:	DOE-OAK
Contact:	Pamela Kappelhof 510-422-6171
Audience:	Project leaders, principal investigators, division leaders, group leaders, and new resource analysts
Description:	(formerly "Quality Budget Estimating for the Non-Financial Manager") This course will cover the principles of developing a cost estimate and managing expenditures. The information presented is applicable to all types of funding at LLNL (DOE, WFO, G&A, etc.). At the conclusion of this course, participants will be able to: <ul style="list-style-type: none">• Define their financial management responsibilities and establish an effective financial management team.• Define financial management terms and procedures.• Identify the steps necessary to develop a cost estimate, and apply distributed charges (OPC, PMC, OFC, G&A, etc.). After this course, students may want to take the Cost Estimating Workshop (FM1020) to further develop their skills.
Prerequisites:	FM1000, Overview of Financial Management (recommended)
Media:	Computer-based slides
Activities:	None
Course Length:	4.0 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student Evaluation/JPM:	None
Applicable DOE Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Effort Workshop
Course Number:	FM2000
Fee:	No fee
Developed, Revised:	12-93
Operations Office:	DOE-OAK
Contact:	Mary Linton 510-423-0871
Audience:	Open to all employees
Description:	<p>This course will provide participants with an understanding of the LLNL effort reporting process using the timecard system. The course goal is to assist the Programs in monitoring their labor charges more efficiently and answering questions on the detail efforts reports available through ASSIST. These topics are covered:</p> <ul style="list-style-type: none"> • Processing timecards • Introduction to FTEM, the new electronic timecard system • Validation and correction of timecard information <ul style="list-style-type: none"> — Effort charged to closed account (drop-out report) — Effort charged to incorrect account (detail effort and global effort transfers) — Incorrect reporting of leave (corrected timecard)
Prerequisites:	None
Media:	Computer-based slides
Activities:	None
Course Length:	2.0 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student	
Evaluation/JPM:	None
Applicable DOE	
Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Ledger Adjustments
Course Number:	FM2010
Fee:	No fee
Developed, Revised:	12-93; revised, 2-95
Operations Office:	DOE-OAK
Contact:	Mary Linton 510-423-0871
Audience:	Resource analysts
Description:	<p>Upon completion of this course, participants will be able to open general ledger accounts, maintain signature authority, close accounts, and prepare cost transfers with appropriate justification and documentation. The following topics are covered:</p> <ul style="list-style-type: none"> • Opening and closing accounts • Signature authority • Cost-transfer minimization • Justification • Documentation • Transfers between direct and indirect accounts • How to calculate distributed charges • Liens and pre-liens • Electronic cost transfers • Budget and Reporting (B&R) codes and Program codes • Cost accruals
Prerequisites:	FM1000, Overview of Financial Management (recommended)
Media:	Computer-based slides
Activities:	Scenarios and justification
Course Length:	4 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student	
Evaluation/JPM:	None
Applicable DOE	
Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Construction Funding and Accounting, Modules I & II
Course Number:	FM2030-A
Fee:	No fee
Developed, Revised:	3-95
Operations Office:	DOE-OAK
Contact:	Mary Linton 510-423-0871
Audience:	Resource analysts, project managers, facility managers, and others with responsibilities involving construction activities.
Description:	This course consists of two modules, an Overview of Construction Funding and Accounting, and Early Project Development. The Overview, which is 3.5 hours, provides a broad knowledge of funding and accounting processes as they apply to different types of construction projects. Early Project Development, a 2-hour module, identifies concerns that must be addressed before the construction funding request. This course is a prerequisite for FM2030-B and FM2030-C.
Prerequisites:	FM1000, Overview of Financial Management (recommended)
Media:	Computer-based slides
Activities:	Scenarios to determine funding sources
Course Length:	5.5 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student	
Evaluation/JPM:	None
Applicable DOE	
Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Construction Funding and Accounting, Modules III & IV	
Course Number:	FM2030-B	
Fee:	No fee	
Developed, Revised:	3-95	
Operations Office:	DOE-OAK	
Contact:	Mary Linton 510-423-0871	
Audience:	Resource analysts, project managers, facility managers, and others with responsibilities involving construction activities.	
Description:	This course consists of two modules, both of which deal with construction projects funded with operating money. One module addresses projects which are less than or equal to \$300K; this is the most common range of construction projects at LLNL. The other module addresses projects which are over \$300K and the specific LLNL policies and procedures governing these projects. Participants will be able to identify the criteria which designate operating-funded projects needing approval, and will be able to apply the financial processes for that approval.	
Prerequisites:	FM2030-A	
Media:	Computer-based slides	
Activities:	None	
Course Length:	3.5 hours	
Copyright Status:	N/A	
Course Review Cycle:	Annual or as policy and procedures change	
Student Evaluation/JPM:	None	
Applicable DOE Orders:	N/A	
Accredited:	N/A	

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Construction Funding and Accounting, Modules V, VI, & VII
Course Number:	FM2030-C
Fee:	No fee
Developed, Revised:	3-95
Operations Office:	DOE-OAK
Contacts:	Mary Linton 510-423-0871
Audience:	Resource analysts, project managers, facility managers, and others with responsibilities involving construction activities.
Description:	This course consists of three modules, all of which are related to construction projects funded with capital money. Participants will be introduced to the Capital Assets Management Process (CAMP) and to the approval/funding processes for line-item projects and General Plant Projects (GPP). Participants will be able to identify the criteria which designate capital projects, and will be able to apply the processes for approval of these projects.
Prerequisites:	FM2030-A is required
Media:	Computer-based slides
Activities:	None
Course Length:	3.5 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedures change
Student Evaluation/JPM:	None
Applicable DOE Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Capital Equipment
Course Number:	FM2040
Fee:	No fee
Developed, Revised:	7-95
Operations Office:	DOE-OAK
Contact:	Mary Linton 510-423-0871
Audience:	Resource analysts and other employees with financial responsibilities for the acquisition of capital equipment.
Description:	Upon completion of this course, participants will be able to define and apply the term "Capital Equipment," outline the processes for acquisitions of capital equipment, and identify types and sources of funding, apply the concepts of "maintenance" and "significant betterments" to capital equipment, and identify the key contacts for tracking and retiring capital equipment. Topics included: <ul style="list-style-type: none">• Capital equipment criteria• Personal property, real property, and related personal property• Sources of capital equipment funds• Fabrication of capital equipment• Other methods of acquiring cad units and the Property Record Unit Catalog• Maintenance of capital equipment• Betterments to capital equipment• Trailers and modular units
Prerequisites:	FM1000, Overview of Financial Management (recommended)
Media:	Computer-based slides
Activities:	None
Course Length:	3 hours
Copyright Status:	C/A
Course Review Cycle:	Annual or as policy and procedure change
Student	
Evaluation/JPM:	None
Applicable DOE	
Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Unallowable Costs
Course Number:	FM3000
Fee:	No fee
Developed, Revised:	6-95
Operations Office:	DOE-OAK
Contact:	Mike Hodsdon 510-423-4005
Audience:	Resource analysts; others responsible for initiating, reviewing or approving expenditures and cost allocations; persons responsible for policies and procedures that affect costs.
Description:	This course identifies and discusses costs that are unallowable under Contract 48. At the conclusion of this course, participants will be familiar with each of the 35 expressly unallowable cost clauses in Contract 48, and understand how costs can be unallowable if they are not in accordance with Contract terms, "allocable" and "reasonable." The requirement for costs to be consistent with generally accepted accounting principles will also be introduced. Participants will be provided with reference material from Contract 48 and policy and procedures.
Prerequisites:	None
Media:	Computer-based slides
Activities:	Case study scenarios, beginning and end
Course Length:	2 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedure change
Student	
Evaluation/JPM:	None
Applicable DOE	
Orders:	N/A
Accredited:	N/A

Financial Management Training Program (FMTP), Continued

Courses Available

Title:	Program Development for the 90s
Course Number:	FM4000
Fee:	No fee
Developed, Revised:	7-95
Operations Office:	DOE-OAK
Contact:	Karen Karr 510-423-9106
Audience:	Technical staff and/or those responsible for initiating and administering technical projects
Description:	<p>The 90s will challenge LLNL to focus on dynamic problems of national importance and to work in an environment where the resources of Federal, state, and local agencies, universities, and industries will be applied to find solutions. This course will provide an overview to Laboratory staff of the administrative tools available and the associated implementation processes. The forum allows for interactions between the participants and the subject matter experts. At the conclusion of this class, participants will be able to identify:</p> <ul style="list-style-type: none">• Methods for funding programs• Support organizations• Individual responsibility• Where to go and who to see for more detailed information
Prerequisites:	None
Media:	Computer-based slides and Handbook
Activities:	None
Course Length:	3 hours
Copyright Status:	N/A
Course Review Cycle:	Annual or as policy and procedure change
Student	
Evaluation/JPM:	None
Applicable DOE	
Orders:	N/A
Accredited:	N/A

Administrative Information Systems (AIS) Department

Overview

Administrative Information Systems (AIS) assists Laboratory clients with automated solutions to business information problems. The AIS End Users Services Team provides training for three institutional products:

- Administrative Support Systems for Information and Storage (ASSIST)
 - Batch Financial Resource Reporting System
 - Estimate. AIS and FMTP recently (1995) combined their efforts and skill to develop an easy step-by-step training course
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Point of Contact

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Courses Available

Course Title:	ASSIST Basics
Course Number:	AI2000-A
Audience:	Anyone who has a desire to learn more about accessing Laboratory institutional data through ASSIST to process on-line queries, create on-line reports, and download information to an application database. Examples include resource management and coordination, procurement tracking and distribution, property management, and training coordination.
Prerequisite:	An ASSIST User ID
Prerequisite course:	EC1035, Introduction to PC and DOS; EC2520, Introduction to Macintosh
Hardware:	IBM PC or Macintosh
Offered:	Scheduled as needed
Time(s):	8:30–4:00
Type of instruction:	Interactive instruction with several individualized mini-labs
Instructor:	AIS End User Services Team
Fee:	\$240
Number of participants:	6–8

Administrative Information Systems (AIS) Department,

Continued

Courses Available

Course Title:	Batch Basics
Course Number:	AI2002-A
Audience:	Anyone who has a desire to build batch reports accessing Laboratory institutional data to process complex queries that are too large to view on-line
Prerequisite:	An ASSIST User ID
Prerequisite course:	AI2000-A, ASSIST Basics; EC1035, Introduction to PC and DOS; EC2520, Introduction to Macintosh
Hardware:	IBM PC or Macintosh
Offered:	Scheduled as needed
Time(s):	8:30–4:00
Type of instruction:	Interactive instruction with several individualized mini-labs
Instructor:	AIS End User Services Team
Fee:	\$240
Number of participants:	6–8

Course Title:	ESTIMATE Basics
Course Number:	AI2003-A
Audience:	Resource Analysts and Resource Managers
Prerequisite:	An ASSIST User ID
Prerequisite course:	AI2000-A, ASSIST Basics; EC1035, Introduction to PC and DOS; EC2520, Introduction to Macintosh; FM1020, Cost Estimating Workshop
Hardware:	IBM PC or Macintosh
Offered:	Scheduled as needed
Time(s):	8:30–4:00
Type of instruction:	Interactive instruction with several individualized mini-labs
Instructor:	AIS End User Services Team
Fee:	\$240
Number of participants:	6–8

Administrative Information Systems (AIS) Department,

Continued

Courses Available

Course Title:	LROCC on ASSIST
Course Number:	AI2005
Audience:	Anyone who needs to create LROCC reports from ASSIST
Prerequisite:	An ASSIST User ID
Prerequisite course:	EC1035, Introduction to PC and DOS; EC2520, Introduction to Macintosh
Hardware:	IBM PC or Macintosh
Offered:	Scheduled as needed
Time(s):	8:30–11:30
Type of instruction:	Interactive instruction with several individualized mini-labs
Instructor:	AIS End User Services Team
Fee:	\$120
Number of participants:	6

Course Title:	ASSIST/Batch for Resource Managers
Course Number:	AI2006
Audience:	Resource Analysts
Prerequisite:	An ASSIST User ID and six months as a Resource Analyst
Prerequisite course:	AI2000-A, Assist Basics; AI2002-A, Batch Basics
Hardware:	IBM PC or Macintosh
Offered:	Scheduled as needed
Time(s):	8:30–4:00
Type of instruction:	Interactive instruction with several individualized mini-labs
Instructor:	AIS End User Services Team
Fee:	\$240
Number of participants:	6

Technology Transfer Initiatives Program

Overview

With the increased emphasis on bringing new business into the Laboratory, the Technology Transfer Initiatives Program created a “Program Development” series of courses to provide guidance for LLNL employees. The training modules are designed to cover the fundamental elements needed for creating, developing, and/or enhancing an alliance with outside entities, from the “*Essentials of Program Development*” through “*Patent Applications*.”

Point of Contact

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Courses Available

Course Title:	Technology Transfer—Past, Present, and Future
Course Number:	TT0001
Description:	During the past 40 years, the Laboratory has undergone many transformations as it has taken on new and challenging missions. One of the more profound changes is taking place today as the people who make up this institution begin to interface with the private sector in entirely different ways. Intellectual property and proprietary information are causing each of us to rethink our historic role of freely disseminating unclassified information for the advancement of technology and industry. This workshop takes us from our earliest statutory directives and moves us through the present era of Cooperative Research and Development Agreements (CRADAs) and licensing to a future where we will serve our country in new and exciting ways.
Audience:	Employees who want to learn more about technology transfer
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–10:30
Length of course:	2 hours
Type of instruction:	Lecture
Fee:	\$25
Number of participants:	25–100

Technology Transfer Initiatives Program, Continued

Courses available

Course Title:	Intellectual Property From A-to-Z
Course Number:	TT0002
Description:	This workshop will cover the legal requirements for obtaining and protecting the intellectual property rights for patents, copyrights, trademarks, trade secrets, and proprietary information. The workshop will emphasize LLNL Patent Group procedures and the ways to prevent loss of intellectual property rights.
Audience:	Employees interested in intellectual property rights
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–10:30
Length of course:	2 hours
Type of instruction:	Lecture
Instructor:	Patent Group Attorneys
Fee:	\$25
Number of participants:	25–100

Course Title:	Writing for Dollars: How to Write an Effective Proposal
Course Number:	TT0003
Description:	What makes a good proposal? What criteria do evaluators use to judge your proposal? In this workshop, you will learn how to showcase benefits and features, how to recognize and avoid the pitfalls of a bad proposal, how to determine milestones and deliverables, and other “tricks of the trade.”
Audience:	Employees interested in writing proposals
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–10:30
Length of course:	2 hours
Type of instruction:	Lecture
Instructor:	TID Editors
Fee:	\$25
Number of participants:	25–100

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Industrial Partnering: Successful Mechanisms
Course Number:	TT0004
Description:	This workshop covers the substantive components of the existing and proposed methods of collaboration with industry available at LLNL. It will look at some of the practical problems associated with collaborative research proprietary information, deadlines, and contract administration. The workshop will discuss and distinguish between Cooperative Research and Development Agreements (CRADAs), Site Access Agreements, Personnel Exchanges, Machine Technology Access Centers, New Facility User possibilities, and the emerging technology transfer aspects of Work for Others. It will also discuss Laboratory, state, and Federal efforts for small business development.
Audience:	Employees interested in industrial partnering
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–10:30
Length of course:	2 hours
Type of instruction:	Lecture
Instructor:	Technology Transfer staff
Fee:	\$25
Number of participants:	25–100

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Licensing: Turning on the Royalty Stream
Course Number:	TT0005
Description:	This workshop is organized for and oriented to the needs of Laboratory investigators. The workshop will cover the step-by-step process from invention disclosure to the successful transfer of a technology to the commercial workplace through licensing. Topics include preparing an effective invention disclosure, assessing the technology for commercial applications, marketing the technology, finding potential licenses, selecting the appropriate type of licensing agreement, distributing the royalties, licensing vs CRADAs, the importance of bar dates, and the cooperative but different roles of inventor, the Laboratory Program, and the Technology Transfer Office.
Audience:	Laboratory investigators
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–10:30
Length of course:	2 hours
Type of instruction:	Lecture
Instructor:	Technology Transfer staff
Fee:	\$25
Number of participants:	25–100

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:

Course Number:

Description:

Topics:

Essentials of Program Development

TT0006

This is a fundamental broad-based course in program development that will provide skills, tools, and techniques for identifying and developing opportunities with existing and new sponsors. The course provides an introduction to and an overview of program development from A to Z, beginning with an initial internal assessment of strengths, weaknesses, and opportunities, and continuing through program management and monitoring long-term performance.

- An organizational self-assessment of strengths, and weaknesses, including an analysis of the environment and alternative sources in light of the Laboratory's strategic objectives
 - Identification of possible and probable markets, including profiling qualified sponsors, and understanding different buyer roles and the decision making process
 - Market analysis, including identifying sponsor needs and developing go/no-go criteria
 - Sponsor analysis, including assessing the requirements, understanding the sponsor's needs and expectations, identifying key issues, and weighing the Laboratory's capabilities
 - Strategic and tactical planning, including preparing a program development outline for capturing the business opportunity and monitoring progress
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Technology Transfer Initiatives Program, Continued

Courses Available

	<ul style="list-style-type: none">• Sponsor development and retention, including using an information and communication plan, monitoring satisfaction and progress, and creating sponsor delight• Developing and documenting a formal business plan for developing specific sponsors or overall program development initiatives• Program management, including managing ongoing relationships, monitoring performance, and responding to new requirements
Audience:	Employees involved in program development within their organization
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–4:30
Length of course:	24 hours
Type of instruction:	Lecture and small group exercises
Instructor:	Self-Management Institute
Fee:	\$600–900
Number of participants:	25

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Writing Laboratory Proposals
Course Number:	TT0007
Description:	In this course, program and project leaders will learn how to generate competitive proposals that communicate the Laboratory's unique capabilities and benefits to existing or potential sponsors. This class will provide the skills, knowledge, tools, and techniques to plan, execute, and manage all essential elements of competitive proposal development and writing.
Topics:	<ul style="list-style-type: none"> • Developing a go/no-go criteria for deciding whether or not to generate a formal proposal or white paper • Defining customer and Laboratory goals, requirements, and expectations to determine the Laboratory's offer, assess LLNL's potential, and develop a document strategy and themes • Mocking-up and writing effective executive summaries • Forming and managing proposal teams and assigning roles and responsibilities • Designing user-friendly, state-of-the-art formats, visuals, covers, etc. • Outlining the proposal and responding to sponsor requirements and instructions • Storyboarding proposal sections and writing proposal drafts quickly and effectively • Organizing and conducting reviews and approvals • Developing and using commercial, institutional, or organizational resources to support proposal preparation • Customizing techniques for specific sponsors, subjects areas, etc. • Learning techniques to minimize the pain and cost of proposal writing
Audience:	Employees who write Laboratory proposals
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–4:30
Length of course:	16 hours
Type of instruction:	Lecture and small group exercises
Instructor:	Self-Management Institute
Fee:	\$525–725
Number of participants:	15

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Enhancing Sponsor Relations
Course Number:	TT0008
Description:	Whereas Essentials of Program Development (TT0006) addresses the more global aspects of developing business opportunities, this course focuses on expanding and solidifying specific sponsor relations. Participants will explore techniques for partnership and team spirit with the sponsor.
Topics:	<ul style="list-style-type: none">• Understanding value-added and how to translate the concept into specific strategies for Laboratory sponsors• Developing listening and questioning skills to create an open dialogue and appreciate the sponsor's real issues and requirements• Learning how to pace sponsor interactions; reading and adapting to sponsor feedback; and clarifying, paraphrasing, and summarizing discussions• Developing and expanding the knowledge/information base on the sponsor through a variety of resources and approaches• Identifying, profiling, and influencing the sponsor's key players while building trust and support throughout their organizations• Preparing for and facilitating customer meetings to accomplish partnership goals• Assessing and monitoring customer satisfaction, working tough problems, and maintaining momentum
Audience:	Employees involved in their organization's program development
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:00–4:30
Length of course:	16 hours
Type of instruction:	Lecture and small group exercises
Instructor:	Self-Management Institute
Fee:	\$600–900
Number of participants:	15

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Strategic Planning for New Business Opportunities
Course Number:	TT0009
Description:	In this course, participants learn processes, tools, and techniques for assessing their internal and external environments, analyzing alternative sources, balancing short-term interests with longer-term goals, bridging the gap between changing technologies and emerging customer needs, and outlining a business strategy that contains both an analysis and an action plan.
Topics:	<ul style="list-style-type: none">• Conduct assessments of strengths, weaknesses, and opportunities at the Laboratory and their specific area• Conduct an Environmental Factors assessment• Examine corporate mission and define their mission and vision statements within the framework of the corporate strategy and in response to internal/external assessments• Analyze alternative sources and develop a positioning strategy in relation to other sources• Assess sponsor needs and expectations, technology issues, and technical and program risks• Write a formal strategic business plan that identifies the path forward• Set goals and specify tracking metrics
Audience:	Employees who are developing business plans for their organizations
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:00–4:30
Length of course:	16 hours
Type of instruction:	Lecture and small group exercises
Instructor:	Self-Management Institute
Fee:	\$600–900
Number of participants:	15

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Value-Added Program Management
Course Number:	TT0012
Description:	As the Laboratory transitions more heavily into dual use and commercial projects, the balance between technical performance, cost, and schedule must be re-thought. This course provides the framework for implementing new methods for managing programs in the post-Cold War world.
Topics:	<ul style="list-style-type: none"> • Introduction to and definition of program management • The program manager and program team • The program management environment • Program risk management • The program cycle • Program visibility (oversight) • The role and relationship of system engineering • Program business controls • The elements required for successful program management • Program status • Program requirements • Corrective actions • Program organization • Program leadership • Program planning
Audience:	Experienced program and project managers
Prerequisite:	Knowledge of the steps in the Project Life Cycle; the basics of project planning; how to budget and schedule a project; how to write a technical task description; and how to establish project milestones. EN2626, CO0519, or equivalent experience.
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:30–4:30
Length of course:	24 hours
Type of instruction:	Lecture and small group exercises
Instructor:	Training Dynamics
Fee:	\$600–900
Number of participants:	25–30

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Negotiation Mastery
Course Number:	TT0013
Description:	This is a fundamental business communication course designed to promote sponsor relationships, expand the financial sponsorship of Laboratory business opportunity programs, and improve project management with existing and new sponsors. The course provides the skills, knowledge, and tools for conducting productive win-win negotiations.
Topics:	<ul style="list-style-type: none">• Examine negotiation as a problem-solving tool for resolving misunderstandings and conflicts with Laboratory sponsors, industrial partners, or internal contacts• Explore five different negotiating styles: Win-Lose, Lose-Lose, Compromise, Win-Win, and No-Deal• Develop an appreciation for the Negotiation Strategy Model, and learn how to use it to determine which style to use, given the importance of the relationship and other factors• Understand how power and influence impact the negotiation process and learn ten specific influence tactics to use in negotiations• Review the four keys to successful negotiating from the Harvard Negotiation Project• Learn specific techniques for using negotiating proactively to set mutually agreeable programmatic goals, technical work statements, budgets, and schedules resulting in mutually acceptable goals at acceptable costs and within reasonable timelines
Audience:	Employees who negotiate with sponsors
Prerequisite:	None
Prerequisite course:	None
Offered:	Scheduled as needed
Time(s):	8:00–4:30
Length of course:	16 hours
Type of instruction:	Lecture and small group exercises
Instructor:	Self-Management Institute
Fee:	\$450–750
Number of participants:	25

Technology Transfer Initiatives Program, Continued

Courses Available

Course Title:	Patent System and Applications
Course Number:	TT0019
Description:	This course provides a basic knowledge of the meaning of intellectual property and property rights, basic definitions of invention and inventorship, novelty and uniqueness; and a working knowledge of how intellectual property rights are secured, protected, and defended. It will cover the critical importance and value of securing patents for inventions and provide a basic knowledge of the patenting process.
Topics:	<ul style="list-style-type: none"> • Establishing CRADAs and other industrial partnerships • Securing work-for-others programs and other new funding for LLNL • Establishing LLNL origins for new concepts and inventions as a means of enhancing Laboratory prestige • Identifying patentable concepts • Understand the procedures for patent disclosures, applications, and prosecution • Establish necessary documentation through lab books, affidavits, and disclosures • Draft patent application texts
Audience:	Scientists, engineers and others who need to understand the Patent System and who need to file Patent Applications
Prerequisite:	None
Offered:	Scheduled as needed
Time(s):	8:30 am–4:30 pm
Length:	32 hours
Type of instruction:	Lecture, workshop sessions
Instructor:	Access Research Corporation
Location:	To be announced
Fee:	To be announced
Number of participants:	20

Procurement Department

Overview

The Procurement Department and LLNL are committed to developing highly trained procurement specialists. The current training program includes courses for procurement specialists and technical release representatives.

In FY96, Procurement will sponsor courses in such areas as Commercial Contracting, Statements of Work, Procurement and Receiving Information System, Time Management, and Contract Law. Special emphasis will be placed on non-Procurement personnel in using the Procurement credit card for small purchases.

The Procurement Department and the Financial Management Training Program (FMTP) staff have recently combined their efforts and skills to develop an easy step-by-step procurement course that will also be offered in FY96.

Point of Contact

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Courses Available

Course Title:	Certification Training for Technical Release Representatives (TRRs)
Description:	This is a one-and-one-half-day certification program for Technical Release Representatives (TRRs) who are authorized to make releases from Commodity/Service Requirement Subcontracts and Blanket Purchase Agreements, or who are authorized to make ProCard purchases in their respective program areas. Certification consists of two modules. Participants must complete both to receive certification from the Procurement Department.

Procurement Department, Continued

Courses Available

Course Title:	Certification on Commodity Requirement Subcontracts Module 1: Introduction and Classification
Course Number:	PR9111
Topics:	<ul style="list-style-type: none">• Commodity Requirement Subcontract (CRS) used as a procurement tool• Item File detail on the release entry in PARIS• PARIS category listing for all LLNL releases
Required for:	Technical Release Representatives (TRRs) for commodities to obtain certification
Required by:	DOE Order
Repeat frequency:	One time only
Prerequisite:	Participants must be nominated by a supervisor or CMMD manager
Prerequisite course:	None
Length of course:	3 hours
Instructor:	Brenda Ianiro
Fee:	\$50 (covers all four modules)
Number of participants:	20

Course Title:	Certification on Commodity Requirement Subcontracts Module 2: Release Administration
Course Number:	PR9112
Topics:	<ul style="list-style-type: none">• Scope of a CRS in relation to the buyer's and releaser's responsibilities• Contractual obligation and terms and conditions of a CRS• Accountable property
Required for:	TRRs for commodities to obtain certification
Required by:	DOE Order
Repeat frequency:	One time only
Prerequisite course:	PR9111, Certification on Commodity Requirement Subcontracts (Module 1)
Length of course:	3 hours
Instructor:	Brenda Ianiro
Number of participants:	20

Procurement Department, Continued

Courses Available

Course Title:	Certification on Commodity Requirement Subcontracts Module 3: Delegation of Authority
Course Number:	PR9113
Topics:	<ul style="list-style-type: none">• Chain of delegation and release authority granted a releaser• Contractual, legal, and personal liability as a releaser• Regulations, directives, and codes of ethics prescribed by C&MMD
Required for:	TRRs for commodities to obtain certification
Required by:	DOE Order
Repeat frequency:	One time only
Prerequisite course:	PR9112, Certification on Commodity Requirement Subcontracts (Module 2)
Length of course:	3 hours
Instructor:	Brenda Ianiro
Number of participants:	20

Course Title:	Certification on Commodity Requirement Subcontracts Module 4: PARIS Computer Training
Course Number:	PR9114
Description:	Hands-on PARIS release entry training exercises
Required for:	TRRs for commodities to obtain certification
Required by:	DOE Order
Repeat frequency:	One time only
Prerequisite course:	PR9113, Certification on Commodity Requirement Subcontracts (Module 3)
Length of course:	3 hours
Instructor:	Rebecca Cameron
Number of participants:	12

Procurement Department, Continued

Courses Available

Course Title:	Certification for Technical Release Representatives on Service Requirement Subcontracts
Course Number:	Module 1: SRS Concepts
Topics:	PR9115 <ul style="list-style-type: none">• Definition of a Service Requirement Subcontract (SRS)• Types of service contracts LLNL uses• How a SRS works within the LLNL procurement process• How SRSs will change the way we do business• Authorization and code of conduct requirements for Technical Release Representatives (TRRs)
Required for:	TRRs for services to obtain certification
Required by:	DOE Order
Repeat frequency:	One time only
Prerequisite:	Participants must be nominated by a supervisor or CMMD manager
Prerequisite course:	None
Length of course:	3 hours
Instructor:	Brenda Ianiro
Fee:	\$50 (covers all three modules)
Number of participants:	20

Procurement Department, Continued

Courses Available

Course Title:	Certification for Technical Release Representatives on Service Requirement Subcontracts Module 2: SRS Release Administration
Course Number:	PR9140
Topics:	<ul style="list-style-type: none">• TRR responsibilities• Release information• Role of accounts payable• Audits and record keeping• Electronic release
Required for:	TRRs for services to obtain certification
Required by:	DOE Order
Repeat frequency:	One time only
Prerequisite course:	PR9115, Certification for Technical Release Representatives on Service Requirement Subcontracts (Module 1)
Length of course:	3 hours
Instructor:	Brenda Ianiro
Number of participants:	20

Course Title:	Certification for Technical Release Representatives on Service Requirement Subcontracts Module 3: PARIS Computer Training
Course Number:	PR9141
Topics:	<ul style="list-style-type: none">• User information for data input into PARIS release system• Step-by-step procedure of release entry• Hands-on practice of release entry
Required for:	TRRs for services to obtain certification
Required by:	DOE Order
Repeat frequency:	One time only
Prerequisite course:	PR9140, Certification for Technical Release Representatives on Service Requirement Subcontracts (Module 2)
Length of course:	3 hours
Instructor:	Becky Cameron
Number of participants:	10

Procurement Department, Continued

Courses Available

Course Title:	Acquisition Planning
Course Number:	PRXXXX
Description:	This course will provide skills in subcontract planning and solicitation development for both procurement specialists and requesters.
Topics:	<ul style="list-style-type: none">• Long-range procurement planning• Source evaluation procedures• Solicitation development• Competitive range• Enhancing competition• Requirements descriptions, including statements of work (SOWs)• Avoiding crises• Best and final offers• Selection and award
Audience:	Buyers, Subcontract Administrators, Group Leaders, and Technical Requesters who need skills in acquisition planning.
Prerequisite:	None
Length of course:	2 days
Type of instruction:	Lecture-discussion, case studies and practical exercises
Instructor:	TBD
Fee:	\$200 per student
Number of participants:	30

Procurement Department, Continued

Courses Available

Course Title:	Basic Procurement (M&O Perspective)
Course Number:	PR9177
Description:	This course presents procurement overview and background information on the fundamentals of the “Federal Norm.”
Topics:	<ul style="list-style-type: none">• Competition in subcontracting• Types of subcontracts• Methods of procurement• Presolicitation considerations• Cost and price analysis• Subcontract administration requirements
Audience:	Buyers and Subcontract Administrators who need an overview of the requirements of the Federal Norm and M&O Purchasing.
Prerequisite:	None
Length of course:	2 days
Type of instruction:	Lecture-discussion, case studies, and practical exercises
Instructor:	TBD
Fee:	\$200 per student
Number of participants:	30

Procurement Department, Continued

Courses Available

Course Title:	Construction Manager Delegation of Authority
Course Number:	PRXX XX
Description:	This course is designed to instruct Plant Engineering personnel in the legal requirements for directing changes to construction projects. The class is a prerequisite to receiving delegation of authority from the LLNL Business Manager.
Topics:	<ul style="list-style-type: none">• Construction changes• Modifications• Limits of authority• Standards and ethics• Conflict of interest• Change order directive• Contract modification• Reasonableness of price
Audience:	Construction managers, Inspectors, Project managers, Plant Engineering, and Construction contracts specialists.
Prerequisite:	None
Length of course:	4 hours
Type of instruction:	Lecture-discussion, case studies, and practical exercises
Instructor:	Vern Davis and Brenda Ianiro
Fee:	\$50 per student
Number of participants:	10

Procurement Department, Continued

Courses Available

Course Title:	Construction Subcontracts
Course Number:	PRXXXX
Description:	This course provides working knowledge of construction subcontracting, with a general overview of soliciting, awarding, and administration of construction subcontracts according to the "Federal Norm."
Topics:	<ul style="list-style-type: none">• Preparation of solicitations• Selection and documentation requirements• Suspension of work• Terminations• Warranties• Time extensions• Inspection clauses• Brooks Act• Davis-Bacon/Contract Work Hours Acts
Audience:	Buyers and Subcontract Administrators who need an enhanced understanding of construction subcontracting.
Prerequisite:	None
Length of course:	2 days
Type of instruction:	Lecture-discussion, case studies and practical exercises
Instructor:	TBD
Fee:	\$200 per student
Number of participants:	30

Procurement Department, Continued

Courses Available

Course Title:	Contracting & Materiel Management: An Overview
Course Number:	PRXXXX
Description:	This course will explain the overall purchasing system at LLNL. The course will walk a typical requester through the purchasing system, from requisition requirements until the item or service is received at the Laboratory.
Topics:	<ul style="list-style-type: none">• Requirement definition• Requisition documentation• Competition requirements• Single source justification requirements• Procurement integrity• Responsibilities of the requester• Unauthorized procurements• TRR program overview• Inspection and acceptance• Subcontract close-out
Audience:	Requesters, administrators, or procurement specialists who are new to the LLNL purchasing system
Prerequisite:	None
Length of course:	4 hours
Type of instruction:	Lecture-discussion and practical exercises
Instructor:	Mike Hodsdon
Fee:	\$50 per student
Number of participants:	25

Procurement Department, Continued

Courses Available

Course Title:	Contract Law
Course Number:	PRXXXX
Description:	This course will provide an understanding of the United States legal system, basic contract law concepts, and interpretation of the written contract.
Topics:	<ul style="list-style-type: none">• Federal judicial system• Legal concept of jurisdiction• Sources of government contract law• The elements of a contract• Private and public contracts• Roles, duties and conduct of government officials• Rules of contract interpretation• The importance of the SOW and contract specifications
Audience:	Buyers, Subcontract Administrators, and Group Leaders who need to understand the basic legal principles operative in government contracting
Prerequisite:	None
Length of course:	2 days
Type of instruction:	Lecture-discussion, contract law cases and practical exercises
Instructor:	TBD
Fee:	\$200 per student
Number of participants:	25

Procurement Department, Continued

Courses Available

Course Title:	Contract Types
Course Number:	PRXXXX
Description:	This course will provide an understanding of the different contractual arrangements that can be used by the Procurement specialist.
Topics:	<ul style="list-style-type: none">• Risk of performance• General classification of contract types• Fixed-price type contracts• Cost-reimbursement type contracts• Time and materials contracts• Labor hour contracts• Letter contracts• Requirements contracts• Blanket purchase agreements
Audience:	Buyers, Subcontract Administrators, and Group Leaders who desire a better understanding of contract types
Prerequisite:	None
Length of course:	3 days
Type of instruction:	Lecture-discussion, contract law cases and practical exercises
Instructor:	TBD
Fee:	\$200 per student
Number of participants:	30

Procurement Department, Continued

Courses Available

Course Title:	Cost And Price Analysis
Course Number:	PR9191
Description:	This course will provide in-depth analysis of the price and cost elements that comprise contracts at LLNL.
Topics:	<ul style="list-style-type: none">• Overview of contract pricing• Pricing personnel• Contractor cost estimating• Price analysis• Cost analysis• Profit analysis (weighted guidelines)• Documenting the negotiated cost or price• Pricing options and terminations
Audience:	Buyers, Subcontract Administrators, and Group Leaders who desire a better understanding of cost and price analysis
Prerequisite:	<i>Basic Procurement (M&O Perspective)</i>
Length of course:	3 days
Type of instruction:	Lecture-discussion, case studies and practical exercises
Instructor:	TBD
Fee:	\$200 per student
Number of participants:	30

Procurement Department, Continued

Courses Available

Course Title:	Certification Requirements—Module 1
Course Number:	PR9211-1
Topics:	<ul style="list-style-type: none"> • Low-value procurement tools—what they are, why we use them • Delegation of authority; ethics • Release-driven orders and ProCard purchases • The roles of Receiving, Property, Shipping, and Accounting • Review of Chem Track, Self-Assessment, and TRR Desk Audits • Introduction to PARIS and TOPS
Required for:	TRRs to obtain certification
Required by:	LLNL Policy (Best Management Practices)
Repeat frequency:	One time only
Prerequisite:	Participants must be nominated by supervisor or Procurement Manager
Prerequisite course:	None
Offered:	August 30–31
Time(s):	8:30–4:30
Instructor:	Brenda Ianiro
Fee:	None
Number of participants:	50

Course Title:	Release Administration and Computer Practice—Module 2
Course Number:	PR9211-2
Topics:	<ul style="list-style-type: none"> • Item File and PARIS release codes • TRR sample reports • Practice releases and Procard purchases—input data, how to read and hands-on PARIS release entry and ProCard transaction summary
Required for:	TRRs to obtain certification
Required by:	LLNL Policy (Best Management Practices)
Repeat frequency:	One time only
Prerequisite:	Participants must be nominated by supervisor or Procurement Manager
Prerequisite course:	PR9211-1, Certification Requirements—Module 1
Offered:	To be determined
Time(s):	8:30–12:00
Instructor:	Dawn Hamilton/Becky Cameron
Fee:	None
Number of participants:	9

Business Services Department

Overview

The Business Services Department provides several institutional services for LLNL including the management of property and records and offers training courses in support of these activities.

Property Management training includes a description of property management and why it is important, the responsibilities of the property center representative and others involved in managing property, how LLNL tracks property and the life cycle of a property item.

Records Management training covers common problems with paper filing systems, filing system planning, benefits of using computer technology, developing and maintaining filing systems, retention schedules and appropriate equipment and supplies.

Point of Contact

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Business Services Department, Continued

Courses Available

Course Title:	Active Files Management
Course Number:	SD1001
Description:	As the “paperless office” has continued to be elusive and the ease of producing paper faster has created an information and paper explosion, business must again concentrate on managing active paper records through development of an efficient and cost-effective file system. This full-day course on Active Files Management will provide an overview of the design and development of paper document filing systems for your organization’s maximum productivity and efficiency.
Topics:	<ul style="list-style-type: none">• Common problems with today's paper filing systems• Required knowledge and prerequisite planning• Relationship between developing a filing system and the retention schedule• Records inventory, analysis, procedures• Classification into file types• File retrieval, access and charge-out procedures• Benefits of using computer technology• Appropriate filing equipment and supplies
Audience:	Persons interested in proactively managing their own filing systems and those responsible for establishing and maintaining shared filing systems
Required for:	
Required by:	
Repeat frequency:	
Prerequisite:	None
Prerequisite course:	None
Hardware:	
Offered:	Scheduled as needed
Time(s):	
Length :	8 hours
Type of instruction:	Lecture
Instructor:	Nyoakee B. Salway, FAI
Location:	To be announced
Fee:	To be announced
Number of participants:	50
Deadline:	

Business Services Department, Continued

Course Title:	Property Management Training Program
Course Number:	SD2001
Description:	This course provides an overview of the property management system at LLNL. It covers the responsibilities of a property center representative and others involved with managing property; and the policies and procedures involved in all aspects of property such as acquiring, borrowing, loaning, transferring, and removing property. This course will include hands-on training using the Laboratory's computer database for capital and attractive property called PRISM (Property Information System).
Topics:	<ul style="list-style-type: none">• Property management and why it is important• The responsibilities of the property center representative and others involved in managing property• How LLNL keeps track of property• The life cycle of a property item, including information on acquisition, receiving, tracking, inventorying, storing, and disposal.
Audience:	Property center representatives and others involved with managing property
Required for:	
Required by:	
Repeat frequency:	
Prerequisite:	Familiarity with using computers
Prerequisite course:	
Hardware:	IBM PC or Macintosh
Offered:	Scheduled as needed
Time(s):	
Length:	12 hours
Type of instruction:	Lecture, workshop sessions, and hands-on computer instruction
Instructor:	Property Management Division staff
Location:	To be announced
Fee:	To be announced
Number of participants:	12
Deadline:	
